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Current State of the Quebec Fishing Industry, January 1992

Economic and Commercial Analysis Report n° 115

Pêches et Océans
Fisheries and Oceans

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Current State of the Quebec Fishing Industry, January 1992

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INTRODUCTION

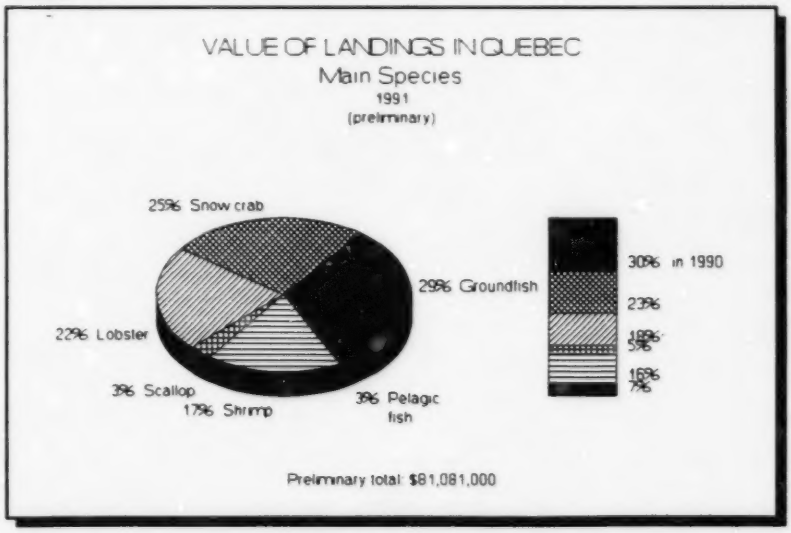
In 1991, the fishing industry in Quebec accounted for nearly 10,500 direct jobs, 1,483 active vessels[1] which landed more than $81 million worth of fishery resources and 110 processors whose production had an estimated value of $190 million. Quebec's landings represented 8% of the total landed value recorded for the Atlantic region as a whole. Although the fishing industry accounts for less than 1% of Quebec's gross domestic product, this purely economic measurement fails to reflect the sector's true importance, which stems from its particular social context.

Considered the driving force of the economy of the maritime regions of Quebec, the fishing industry provides 80% of the jobs in the Lower North Shore, 46% in the Magdalen Islands and 25% in the southwestern Gaspé. It is the leading industry in those areas, where it has helped many communities survive despite unemployment rates that are among the highest in Quebec.

Quebec is above all an exporter of fish. In 1990, it exported nearly 65% of its production. In this context, market fluctuations, like variations in resource levels, exert a significant influence on the fisheries in Quebec.

Groundfish, crab, lobster, shrimp, scallops and pelagic fish are the core products of Quebec's fishing industry. In 1991, they represented 99% of total landed value, compared to 98% in 1990. In this report, we shall examine the fishing industry in Quebec with reference to those species.

Chart 1

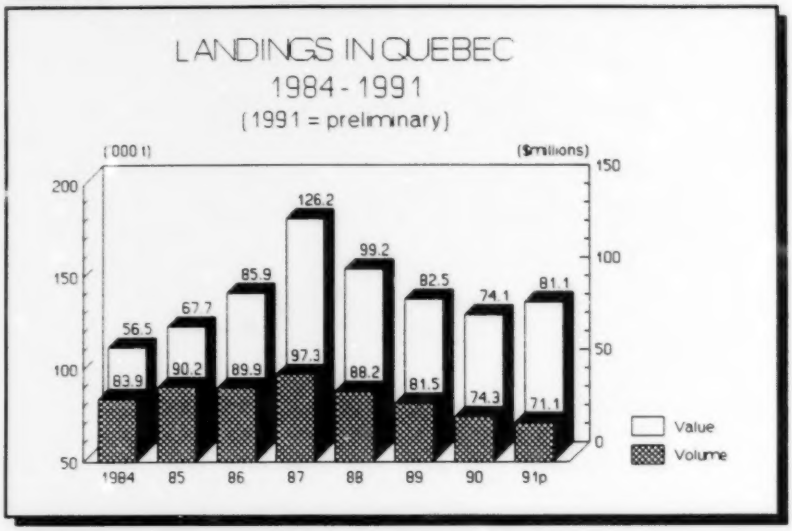


[1]Vessels with at least one landing as shown in DFO's data bank.

1.0 OVERALL TRENDS

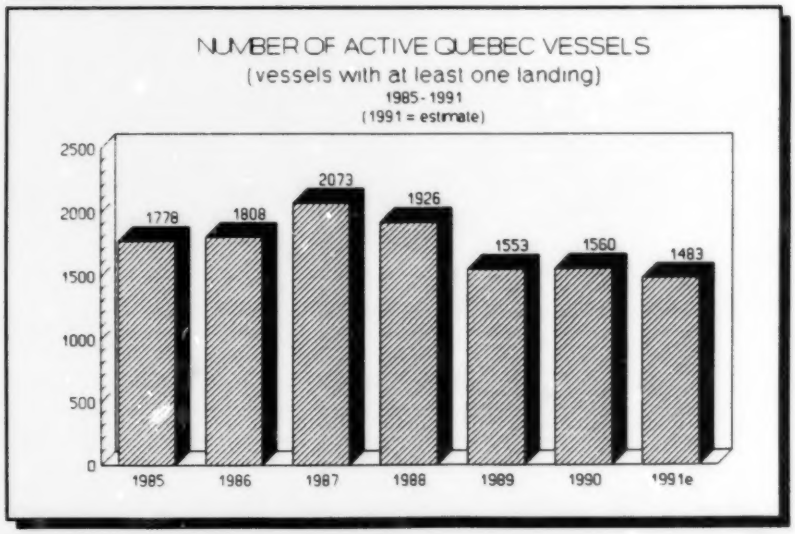
Since 1987, the fishing industry in Quebec has faced declining stocks and a series of price decreases on the major markets for its processed products.

Chart 2



The volume of landings fell 27% during the period from 1987 to 1991. This decrease is attributable mainly to groundfish and snow crab, which posted declines of 39% and 22%, respectively. The landed value, which dropped 41% between 1987 and 1990, showed a recovery in 1991 with a 9% increase.

Chart 3



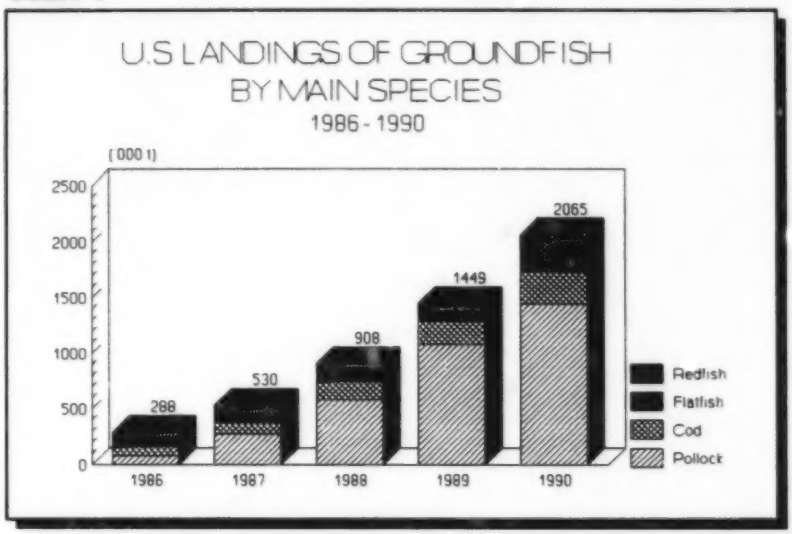
Fluctuations in the resource have a direct impact on the number of vessels engaged in fishing. For example, between 1985 and 1987, the number of active vessels increased by 17%, thus following the uptrend in the value of landings. Between 1987 and 1991, the reverse situation occurred: with landed value declining, the number of active vessels fell by 28%.

2.0 GROUNDFISH

The groundfish sector in Quebec provides employment for 449 active vessels, 1,300 fishermen and an equivalent number of plant employees. The province exports 70% of its output, mainly (84%) to the United States.

2.1 Tertiary sector

Chart 4



In recent years, landings of Atlantic cod by the main producing countries, that is--Canada, Greenland and Norway--have decreased steadily. This trend reflects the impact that overfishing has had on the main world stocks of Atlantic cod. As a result of the decrease in world landings, our main customer--the United States--has had to turn to other suppliers. Increased U.S. participation in the Alaska fishery is still having a major influence on the U.S. market. In less than five years, U.S. groundfish landings rose from 287,000 t (1986) to over 2 million t (1990). The main species responsible for this increase are pollock, Pacific cod and various species of flatfish.

Some changes have already been noted in U.S. consumption: pollock, salmon and catfish now hold a special place in U.S. eating habits. By contrast, U.S. consumption of Atlantic codfish and flatfish is declining. In view of the major changes facing the countries that make up the Commonwealth of Independent States, they are bound to have an urgent need for hard currency and this may prompt them to bring various species, including cod, onto the market. This should change the existing balance in the marketplace significantly in the medium term.

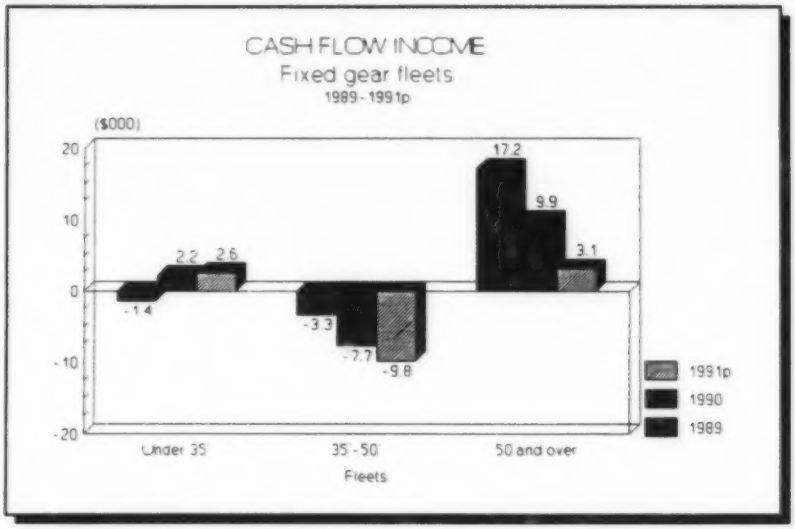
2.2 Secondary sector

The decrease in catches has taken a heavy toll on processing plants. In four years, groundfish supplies have dropped an estimated 43%. Overall, the plants are believed to be a lot worse off now than in the mid-1980s because the sharp decline in supplies has forced them to spread their

fixed costs over a smaller quantity of finished products. Furthermore, the variable operating costs per unit of production probably rose between 1986 and 1991. The sector's rationalization efforts are related to this situation.

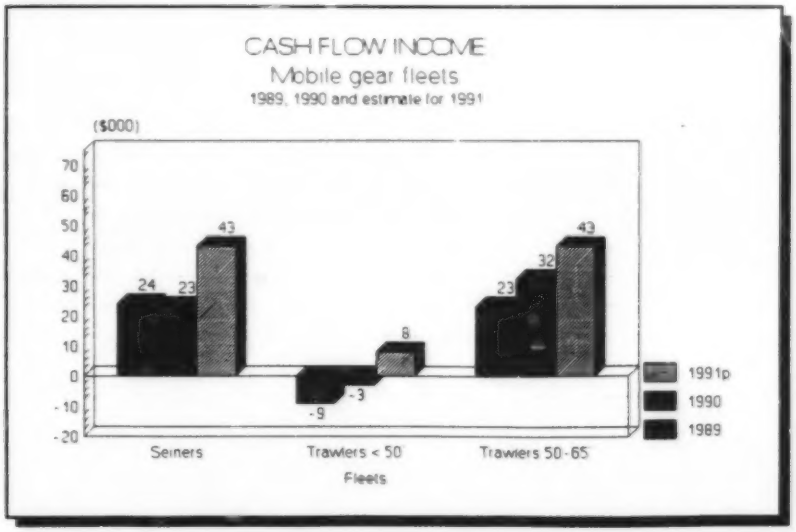
2.3 Primary sector

Chart 5



Since 1987, fixed gear fleets have posted a decrease of almost 70% in their groundfish landings. Cod catches have been much lower than in previous years owing to the state of the Gulf's cod stocks. Despite an overall increase in landed prices, the fleets' financial situation has deteriorated. Consequently, between 1987 and 1990, the number of vessels for which groundfish was the prime source of income fell from 706 to 373, a decrease of 47%.

Chart 6



The volume of groundfish landed by mobile gear fleets has decreased as well. For 1991, trawlers 50-65 feet long posted the largest decrease; it may be higher than 20%. The decrease in the quantity of fish caught was offset by higher landed prices. In the case of cod, the landed price rose from about $0.55/kg (round weight) in 1990 to over $0.75/kg in 1991. In 1991 as well, all the mobile gear fleets

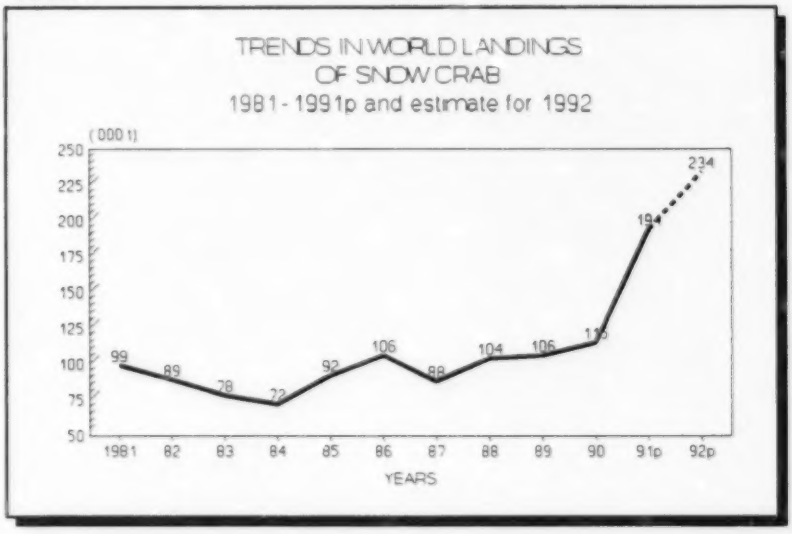
reported receiving slightly higher prices for American plaice. On the whole, the fleets have improved their financial situation by taking advantage of the higher prices.

3.0 SNOW CRAB

Quebec exports roughly 90% of its snow crab production. This species provides work for some 690 fishermen and helpers throughout the southwestern Gulf, the Estuary, the Mid-North Shore and the Lower North Shore. In the secondary sector in 1991, some 1,300 plant employees were involved in snow crab processing operations.

3.1 Tertiary sector

Chart 7



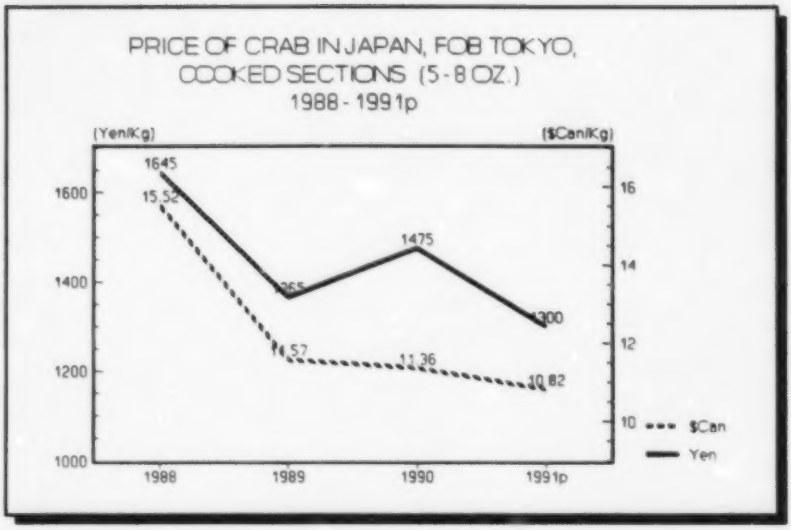
Canada (18%) and the United States (78%) contributed 96% of the world supply of snow crab in 1991. With Alaska's landings on the rise, the total world catch rose from 72,000 t in 1984 to 194,000 t in 1991. In 1992, world landings are expected to be in the range of 230,000 t. Quebec's total catch rose from 6,976 t in 1990 to 7,760 t in 1991, an increase of 12%. By contrast, in 1985, the province's landings totalled 15,000 t.

In 1990, the United States purchased 41% of Quebec's exports in terms of value, followed by Japan with 38% and the United Kingdom with 16%. Based on the preliminary data for 1991, a substantial increase is expected in exports to the United States.

Japanese consumption is dominated by crab sections, whereas U.S. consumers prefer crab meat. After a decline in 1989, Japanese snow crab imports jumped 32% in 1990. From January to October 1991, they were 41% higher than over the same period a year earlier.

It remains to be seen whether the Japanese market will be able to absorb the growing supply of crab, which is already having an impact on prices.

Chart 8



In 1991, the price paid to Canadian exporters for cooked crab sections (5-9 ounces) on the Tokyo market declined by 4.8% compared to 1990. From April to August, the period where the Quebec crab catch is marketed, the average price was about Can. $10.82/kg.

On the U.S. market in 1991, the price of sections (5-8 ounces) sold in Seattle dropped from Can. $6.82/kg to Can. $5.08/kg, down 26% from 1990.

In contrast, 5-lb crab blocks sold for Can. $17.27/kg, up 5.8% over 1990.

3.2 Secondary sector

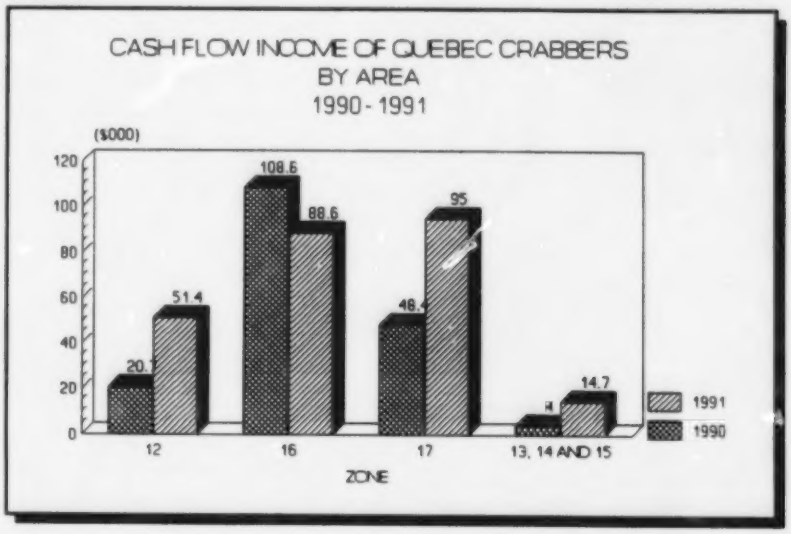
In 1990, Quebec plants produced over $31 million worth of finished snow crab products, or 16% more than in 1989. The operating margin--the difference between the selling price of a given product and the cost of the raw materials used to produce it--represents the amount needed to cover production costs. In the case of crab sections sold in Tokyo, the operating margin was Can. $6.39/kg in 1991, down 11% from 1990.

The operating margin for a 5-lb block of meat sold at Boston rose 5%, from Can. $4.64 to Can. $4.87. This margin has played a role in maintaining the United States' position as the leading importer of Quebec crab since 1990.

3.3 Primary sector

In 1991, Quebec-based crabbers posted higher cash flow as a result of a 12% increase in landings and an average landed price 3.5% higher than in 1990. The only exception was Zone 16 crabbers, who recorded a decrease in cash flow on the order of 18% as a result of a decrease in their quota.

Chart 9



4.0 Lobster

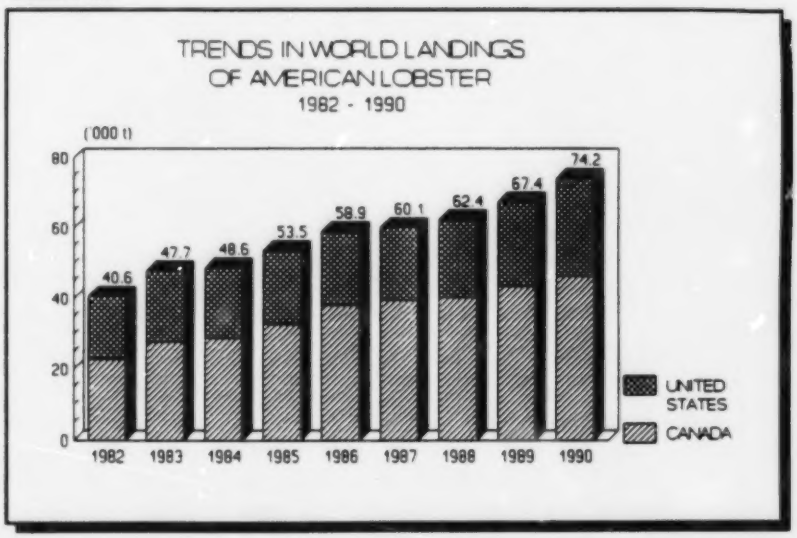
An adjustment is occurring in the market

The lobster industry has undergone considerable change over the past few years. The steady rise in world lobster supplies, U.S. legislation on legal size and the downward trend in prices on the U.S. market are all factors that are causing an adjustment in this market.

Quebec has obviously experienced the effects of these changes in its lobster fishery, which currently employs over 1,200 fishermen and 500 processing plant workers, mainly in the Magdalen Islands and the Gaspé Peninsula.

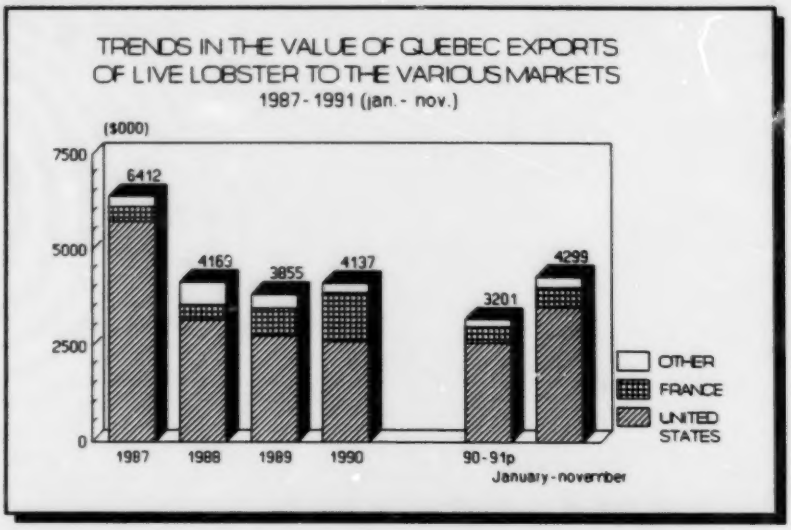
4.1 Tertiary sector

Chart 10



World landings totalled 74,229 t in 1990, up 10% from 1989. The 82% increase recorded between 1982 and 1990 was mainly due to Canadian landings. During this period, the provinces' catches increased from 22,804 t to 46,552 t. The volume landed in Canada thus more than doubled. U.S. landings in the same period rose 55%. The upward trend observed over the past few years continued in 1991.

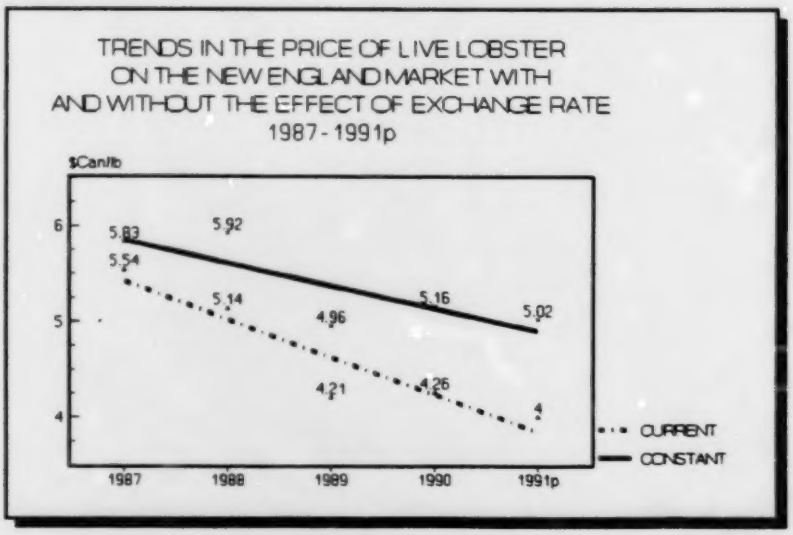
Chart 11



The year 1990 was marked by an increase of approximately 7.3% in exports of live lobster compared to 1989. Shipments to France were responsible for this increase, rising from $714,000 in 1989 to over $1.2 M in 1990. Exports to the United States showed the opposite trend, declining by 5%.

A glance at the preliminary results for 1991 for the period from January to November shows a further increase over the same period in 1990. This increase is mainly due to exports to the U.S., which rose from $2.5 M to $3.5 M, and to shipments to France, which increased by 23%. These uptrends indicate a recovery in demand.

Chart 12



The price of live lobster on the New England market dropped nearly 28% between 1987 and 1991, in response to increases in the quantities available on this market.

From an analysis of the preliminary data on lobster markets, particularly the U.S. market, we can see the beginnings of a trend which, in response to rising supplies, is shifting to marketing aimed more at quantity sales than at price. This orientation is promoting an increase in demand.

4.2 Secondary sector

We shall confine ourselves to examining the operating margin[2] resulting from the production of live "Market" lobster on the New England market.

After rising to Can. $2.44/lb in 1990, the operating margin for the sales of live lobster (1 lb) on the New England market stabilized at Can. $1.68/lb, down 31% from 1990.

4.3 Primary sector

The cash flows[3] of the Gaspé and Magdalen Islands lobster fleets are very different. While the average Gaspé lobster boat lands a little more than 3.0 t of lobster annually, a Magdalen Islands boat catches 7.9 t.

The increase in landed prices contributed to improving the financial situation of Magdalen Islands and Gaspé lobster fleets in 1991.

The earnings of Magdalen Islands lobster fishermen more than tripled this year compared to 1990, reaching $13,839, while the earnings of Gaspé lobster fishermen rose 25% to $3,884.

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[2]The operating margin was calculated based on a landed price of $2.24/lb for the Magdalen Islands. This price is tentative and is subject to change in connection with the 1991 joint marketing plan for the Magdalen Islands.

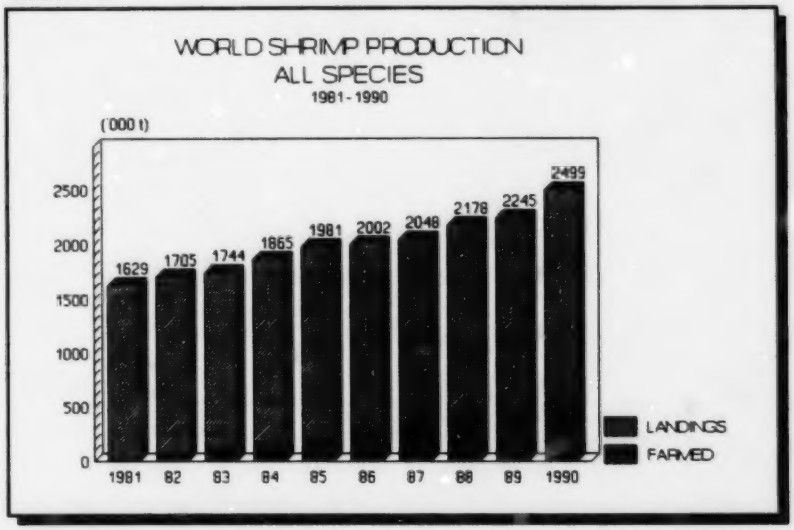
[3]The cash flow of Magdalen Islands lobster fishermen was calculated based on a landed price of $2.24/lb. This price is tentative and is subject to change in connection with the 1991 lobster joint marketing plan for the Magdalen Islands.

5.0 SHRIMP

Cold-water shrimp account for 17% of the total landed value of the commercial fisheries in Quebec. The province's shrimp fishing industry is composed of 54 active vessels and 5 processing plants with a total of 325 workers.

5.1 Tertiary sector

Chart 13



Production of cultured shrimp has continued to increase, thereby boosting the world supply of shrimp on markets. This product now represents over 25% of total world production.

The recession in the United States and the increase in meat consumption in Japan, which has occurred in response to the reduction of tariffs, have prompted some producing countries to sell their shrimp on the European market. Prices for all species of shrimp have declined overall.

In light of this decline, the United States represented the most viable market for Quebec's cold-water shrimp. Under normal conditions, the European market would have offered a promising outlet; however, owing to the decrease in prices and the EEC's tariffs, the U.S. market is still the most suitable destination for Quebec shrimp products.

5.2 Secondary sector

As a result of the decrease in prices on all markets, combined with the slight increase in the average price paid to fishermen, the operating margin of Quebec shrimp producers was considerably lower in 1991 than a year earlier.

While cold-water shrimp commanded a price of roughly Can. $9.15/kg on the Eastern U.S. market, it sold for only Can. $8.26/kg in England. From this, it is clear why Quebec producers preferred to sell their products on the U.S. market this year rather than the European market.

5.3 Primary sector

Chart 14

In the first year of the individual quota management system, fishermen took advantage of the opportunity to better manage their operations during the fishing season. By landing premium-quality shrimp, they earned an average of $1.45/kg this year, compared to $1.20/kg in 1990.

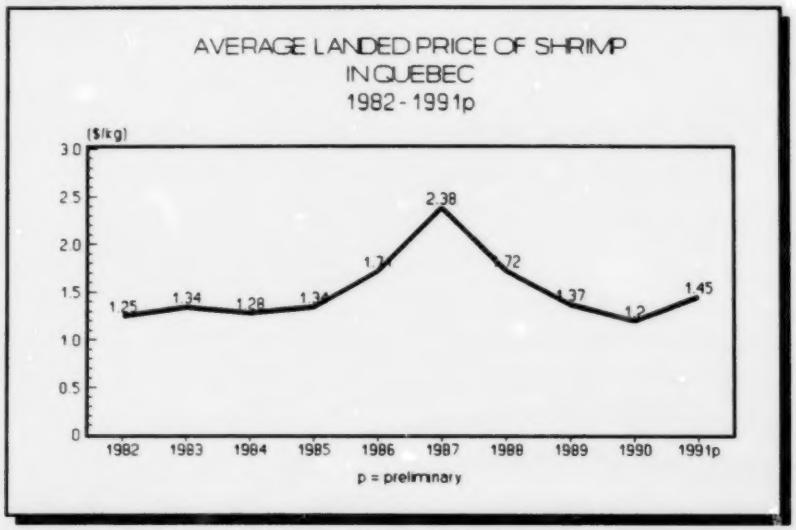
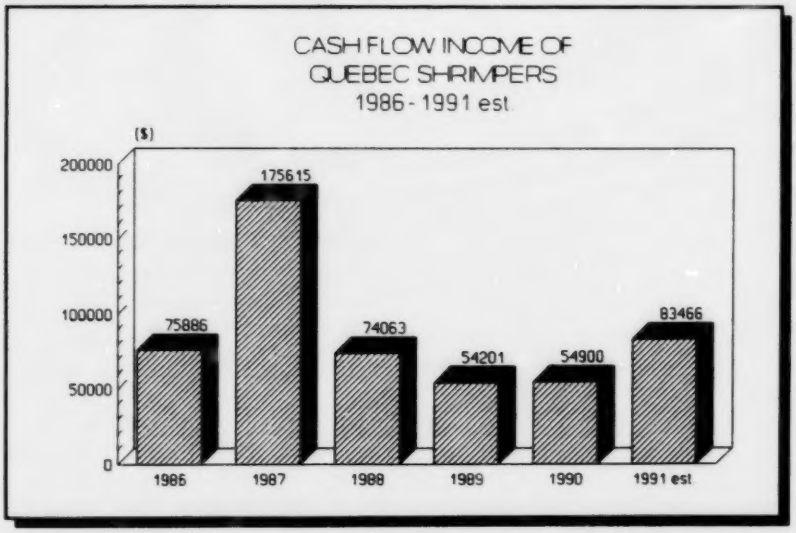


Chart 15

With landings holding steady overall, the average price boosted the cash flow of skipper-captains to over $83,000 this year, an increase of 52% from 1990.



6.0 SCALLOP

In Quebec, scallop fishing is the main source of income for 26 vessel owners and 91 fishermen. Most of the scallops landed in Quebec are caught on the North Shore; a few vessels make a living from this fishery in the Magdalen Islands and the Gaspé Peninsula. Given the limited amount of processing required for scallop products, few plant jobs are devoted to scallop production.

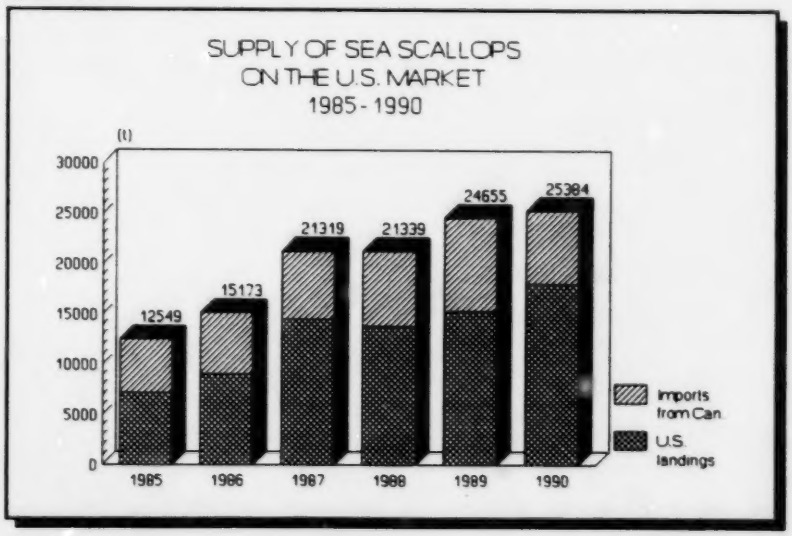
6.1 Tertiary sector

Canada contributed only 11% of the total world landings of 840,000 tonnes in 1989. Quebec's share was barely 0.2%. The Quebec fishery therefore has no influence on international markets.

Quebec is nonetheless affected by foreign markets because it both exports and imports scallops. In fact, it exported nearly half of its output in 1990, with the majority, 81%, going to the United States. On the other hand, Quebec also imported $6.5 million worth of scallops in 1990. This is a large volume considering that it represents nearly 1 1/2 times Quebec's production. Here again, the United States dominates the market, since 75% of Quebec's imports are from this country.

Chart 16

The supply of sea scallops on the U.S. market, as determined by imports and domestic landings, has been growing since 1985. Following a downward trend, which began in 1987, prices stabilized over the last two years. An upswing in demand was recorded in the last six months of 1991, which should help to re-establish price stability.

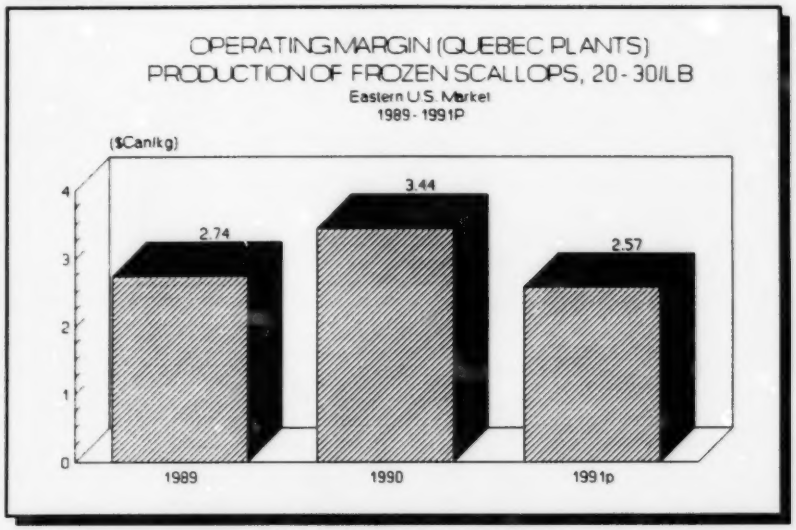


6.2 Secondary sector

Quebec plants produced $4.1 million worth of scallop products in 1990, up 74% from 1989. Nearly three-quarters of the total output consisted of frozen products.

Chart 17

As a result of the stable market prices, the increase in the value of the Canadian dollar against the U.S. dollar and the slightly higher price paid to fishermen in 1991, the operating margin of Quebec plants fell 25% between 1990 and 1991, from $3.44 per kilo of processed meat to $2.57.



6.3 Primary sector

Chart 18

Following a very good year in 1990 with landings of over 3,500 t, a decrease of about 44% is expected in the 1991 catch, which should amount to nearly 2,000 t (live weight). The average landed price rose 8% in 1991, to $9.63 per kilo of meat. Magdalen Islands fishermen received a good price for their catch, thus pushing up the Quebec average.

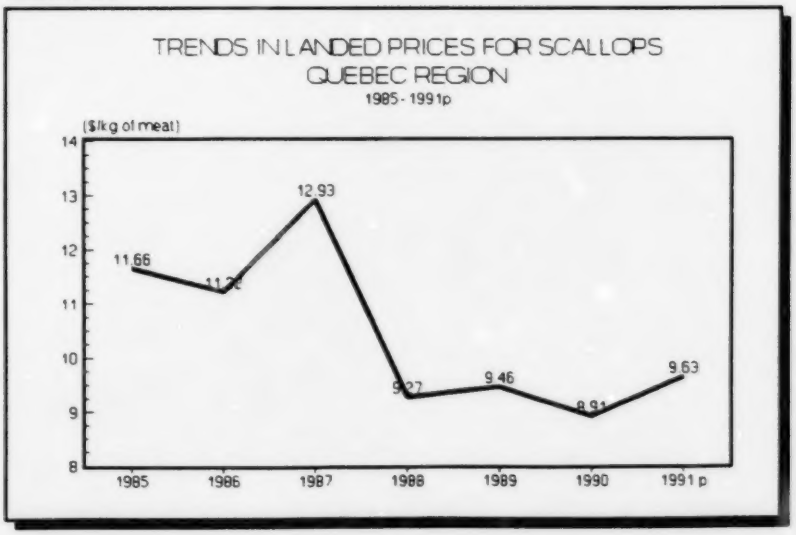
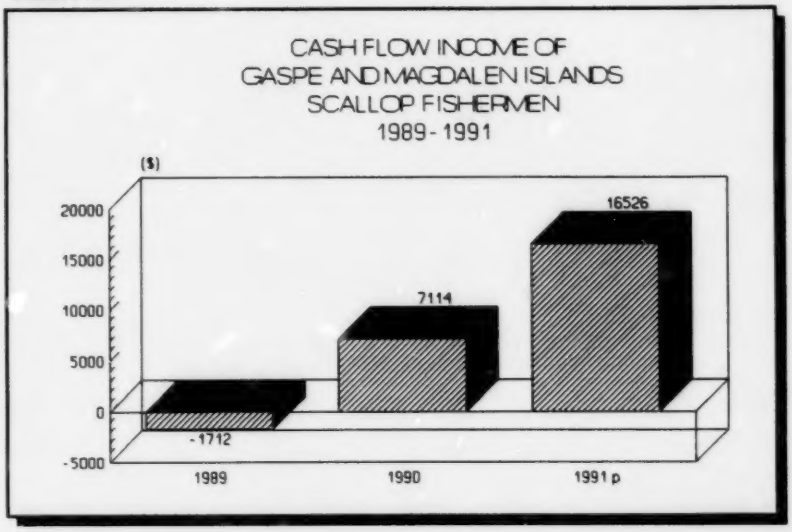


Chart 19



Lower landings, higher landed prices, reduced fishing effort and hence lower costs are factors that helped to boost the cash flow of Gaspé and Magdalen Islands fishermen to over $16,000 in 1991, compared to slightly more than $7,000 last year. Owing to the lack of data on North Shore enterprises, we are unable unfortunately to present the results for the North Shore fleet.

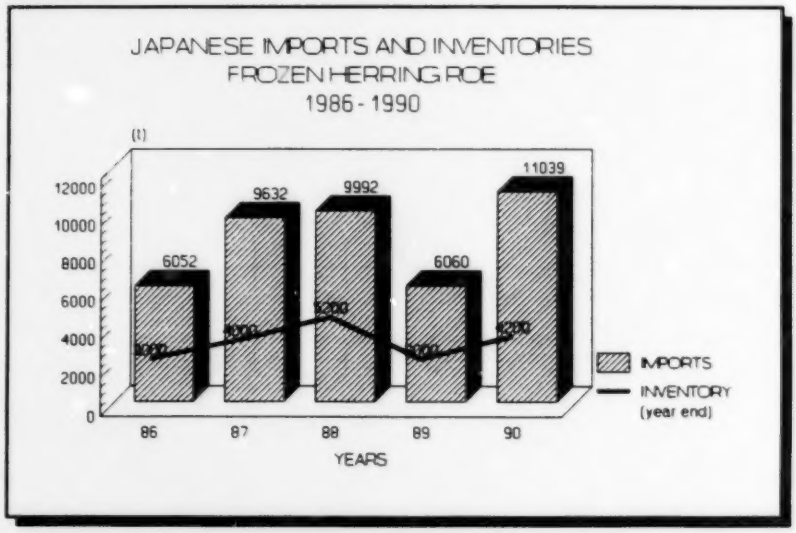
7.0 PELAGIC FISH

In Quebec, the fleets engaged in fishing for pelagic species in 1991 consisted of 39 longliners under 35 feet in length and 14 longliners from 35 to 50 feet long. These two fleets, which provided work for 200 fishermen, accounted for nearly 45% of the total volume of pelagic fish landed in Quebec. Catches of pelagic species, chiefly herring and mackerel, amounted to 7,400 metric tons in 1991.

Whereas CIDA is the main market for mackerel exports. In the case of herring, the Japanese market offers the greatest potential.

7.1 Tertiary sector

Chart 20

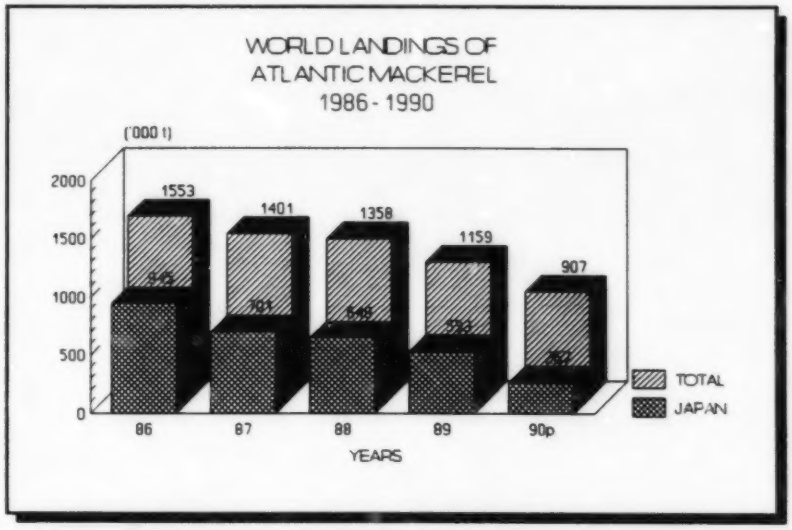


a) Herring: The world supply of herring exceeded the demand for this species. For Canada and Quebec, Japanese demand for frozen herring roe determines the quantities landed and the landed price paid for herring. In 1991, Japanese imports dropped owing to inventory surpluses, Ireland's entry into the market and reduced consumer demand.

b) Capelin: World landings of this species are by Iceland, Norway and Canada. Owing to the size of Canadian capelin, the Japanese prefer to obtain their supplies from Canada. Newfoundland accounts for all of Canada's exports to Japan of frozen whole capelin with roe. Quebec's share of Canadian exports of frozen capelin is negligible.

c) Mackerel: Although Japan accounts for nearly half of world mackerel landings, its catches have decreased steadily over the past five years. The Japanese prefer mackerel with a high fat content, a situation which has made Norway the country's main supplier since its products meet the requirements of Japanese markets. In Quebec, export performance depends largely on the availability of the resource.

Chart 21

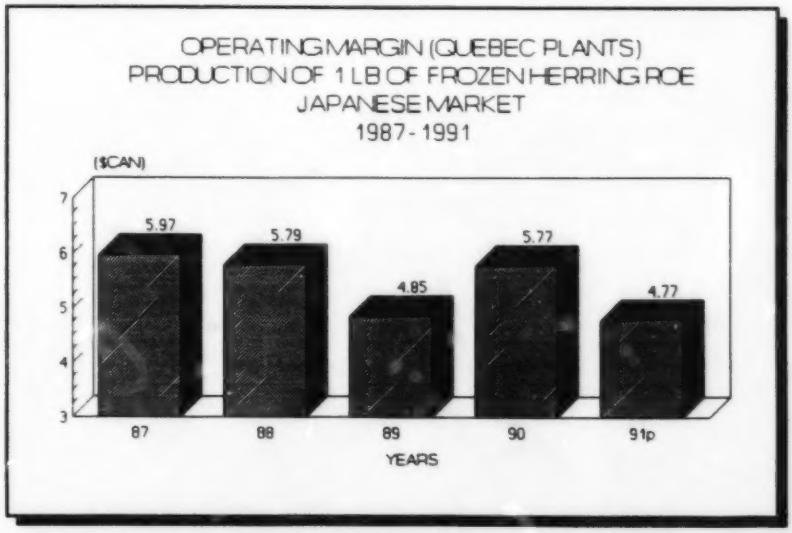


7.2 Secondary sector

In 1991, Quebec processing plants posted a decrease in their pelagic fish production, after generating production valued at $6.3 million in 1990. This decline was due to adverse market conditions.

One of the first consequences of this downturn in 1991 was a 17% decline in the operating margin for one pound of herring roe sold in Japan.

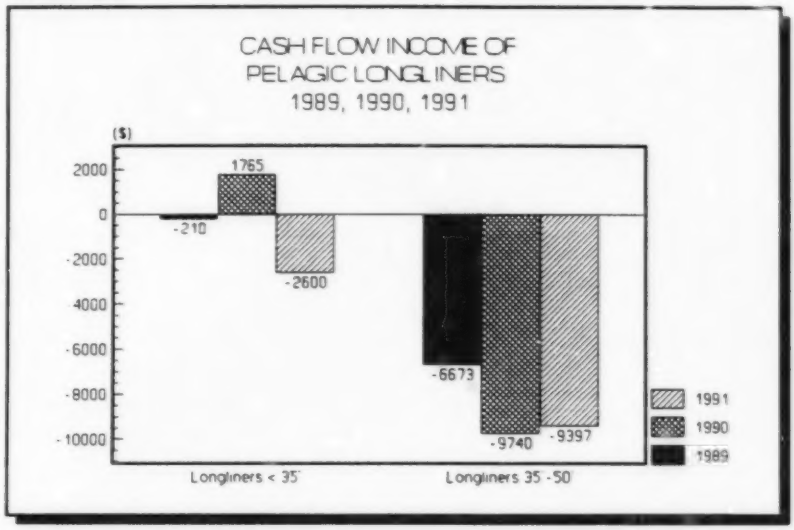
Chart 22



7.3 Primary sector

In contrast with 1990, landings of pelagic fish declined sharply in Quebec in 1991 mainly because of a 50% decrease in herring catches. Mackerel was the only species for which higher landings were recorded, with an increase of 65%.

Chart 23



The situation of fishermen deteriorated as a result of the decrease in landings and landed prices. With fishing effort at a level as high as in 1990, pelagic fleets in Quebec posted negative cash flow in 1991. For longliners from 35 to 50 feet long, the situation was especially critical because their cash flow was negative for the third consecutive year.

In addition, six mackerel seiners started up operations in the Gaspé in 1991. The results for this new type of fishing were not conclusive given that the gear was just being introduced to the area in 1991 and fishermen were learning the ropes. Nonetheless, an assessment of the seiners' profitability should be ready soon.

What to watch for in 1992

- The Commonwealth of Independent States (CIS) is a major unknown for 1992. These countries may well sell groundfish, shrimp, crab and pelagic species to obtain hard currency required for fishing operations. The potential flooding of these products onto world markets would have a definite impact on the prices of the species involved.

- In 1992, the groundfish sector could be affected by the recently announced cuts in cod quotas in Canada and Greenland, which have come at a time when consumers were already balking at the prices of the main cod products.

- The crab supply has increased substantially in recent years, pushing prices down, particularly on the Japanese market. Already in early 1992 large catches were recorded in Alaska, while Japanese imports were on the rise again. In this context, the Japanese market's ability to absorb the additional quantities of crab will have a decisive impact on prices.

- For four years, the prices paid for live lobster have been declining. In 1992, two factors could check or possibly even reverse this trend: the new upturn in demand, which began in 1991, and Maine processors' increased production of frozen lobster.

- Cultured shrimp will continue to boost the shrimp supply on the main markets. Cold-water shrimp supplies from Norway and Iceland, which are still subject to the EEC's tariff, will continue to compete with Canadian products on it's main market, the United States. The impact of their products will depend on trends in exchange rates and how quickly the United States pulls itself out of the recession.

- With regard to scallop markets, legislation aimed at reducing fishing effort on Georges Banks could restrict the supply of sea scallops, thereby pushing prices up. If this does not come about, the market will be essentially the same as in 1991.

- In the case of pelagic fish, industry members in Quebec should follow Japanese consumers' reaction to herring roe closely. The higher year-end inventories in 1991 point to declining demand. For all herring products, the CIS fleet is creating uncertainty in the marketplace. CIDA's food aid program provides a stable outlet for mackerel every year. No major changes are anticipated with regard to mackerel in 1992. For capelin, however, commercial opportunities are limited and there are no signs yet of promising results.

D I V I S I O N D E S S E R V I C E S
E C O N O M I Q U E S

E C O N O M I C S E R V I C E S
D I V I S I O N

Ministère des Pêches et des Océans - Région du Québec
Department of Fisheries and Oceans - Quebec Region

(AVRIL 1992)

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